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ALTERNATIVE ENTERPRISE AND AGRITOURISM: FARMING FOR PROFIT AND SUSTAINABILITY TOOL KIT

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XVII. TRENDS AND DATA

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Agritourism and Recreation Trends—Today and in 2050. NRCS. This is a summary of some of the findings on outdoor land and water recreation and reported in the Alternative Enterprises and Agritourism Resource Manual that is on the RESSD web site. www.nhq.nrcs.usda.gov/RESS/econ/ressd.htm. The full report is in "Outdoor Recreation in American Life: A National Assessment of Demand and Supply Trends." Order the complete report from www.sagamorepub.com.

Outdoor Recreation Trends, Private Land Use Opportunities, Potential Benefits, and Natural Resource Conservation Attitudes, 1994-95. NRCS. This is a summary of 13,000 farmers and ranchers surveyed in 1994-95 and reported in the Alternative Enterprises and Agritourism Resource Manual that is on the RESSD web site. www.nhq.nrcs.usda.gov/RESS/econ/ressd.htm. The full report is in "Outdoor Recreation in American Life: A National Assessment of Demand and Supply Trends." Order the complete report from www.sagamorepub.com.

Agriculture/Alternative Enterprise Opportunities, Benefits, Barriers and Recommendations: Results of an Agritourism and Natural Resources Forum. NRCS. This is a report on a forum held Janaury 1997. It is reported in the Alternative Enterprises and Agritourism Resource Manual that is on the RESSD web site. www.nhq.nrcs.usda.gov/RESS/econ/ressd.htm.

Implications of U.S. Population Growth for Recreational Fishing. USFWLS. This report summarizes fishing participation at the national and state levels by age, race and gender. And, *A Social and Demographic Examination of Fishing Participation.* USFWLS. This report examines fishing participation by species within freshwater, saltwater and Great Lakes environments. Write to U.S. Fish and Wildlife Service, National Conservation Training Center, Publications Unit, Route 1, Box 166, Shepherd Grade Road, Shepherdstown, WV 24443.

What is the Public Doing for Recreation?

Purpose of tech note: This tech note provides guidance to private land owners who are pursuing or interested in developing an agritourism recreation alternative enterprise. This technote will provide information on--***What the public is doing for recreation?*** and ***Why the public is doing this type of recreation?*** These data will be helpful in marketing and developing customer relations for the most viable activities based upon what the public is doing and the natural resources the landowner has on the farm or ranch.

Why Outdoor Recreation?

Outdoor recreation is just one of the many growing demands on the nation's natural resources. The cultural change in this country has placed a magnitude of demand much greater than recreation experts had ever estimated. There is a very different mix of recreational pursuits, settings and services which includes today's of contemporary recreational demands and those that resemble the past. There is high interest across the nation in the environment, nature-based tourism, heritage and establishing a connection with ones roots and the soil.

Realization of the rapid rise in the importance of outdoor recreation brings many opportunities to the rural areas. Some people are traveling further to partake in the beauty of our public lands as well as the private lands, but at the same time many people are traveling shorter distances more frequently to enjoy the beauty of the land and rural recreation activities. Both of these recreation trends provide agritourism opportunities to the farmer, rancher and rural community.

The public is seeking high quality outdoor recreation experiences. The public knows what it wants and is willing to pay for the setting and the experience. This makes it important to understand what the public is doing and how it is recreating. The farmer, rancher, or rural community needs to match its recreation activities to the needs/wants of the customer.

People understand the importance of outdoor recreation for individuals, families, and society as a whole. A 1996 Roper-Starch survey showed the leading benefits to be:

The Benefits of Outdoor Recreation

A sound environment.
Healthy rural economies.
Strengthened families.
Better personal health.
Quality of life and perceived success in life.

Anyone who is considering an outdoor recreation enterprise also needs to consider the tangible factors, such as quality of life, to guide your recreation and agritourism planning efforts. The Roper-Starch survey reported that outdoor recreationists are more satisfied with their quality of life than others. Quality of life was measured using factors such as satisfaction with friends, career, health, fitness, and leisure time.

Leisure time is one of the more tangible measurements that is helpful in planning. A 1996 Roper-Starch survey "Outdoor Recreation in America" showed:

Why We Spend Our Leisure Time Outdoors

Fun (rated important by 76 percent)
Relaxtion (71 percent)
Health and exercise (70 percent)
Family together (68 percent)
Stress reduction (66 percent)
Teach kids values (64 percent)
To experience nature (64 percent)

What does this mean? The key words that one needs to consider in planning an agritourism and recreation enterprise activity based upon these findings include: adventurous, learning, nature-based, family type experience(s), ethically and morally based values. These would be some of the guidelines to design the recreation enterprise, develop marketing information and advertisements, and interacting with the customer before, during and after their participation in your recreation enterprise.

What is the Public doing?

"What People Are Doing?" in outdoor recreation is captured by the American Recreation Coalition annual survey of 2,000 people since 1994. This "Outdoor Recreation in America 1998" survey shows continuing upward trends in outdoor recreation. These trends are shown for 1994 to 1998 in Table 1 for that percent of the population participating in 35 activities for adults 16 years and older. The most significant change occurred in "driving for pleasure" since 1994 with a 7-percentage point drop between 1994 and 1996 followed by a five percentage point increase between 1997 and 1998. A similar swing occurred for fishing, picnicking, hiking, jogging and others. However, several of these regained their losses by 1998, except for fishing, and jogging, which are showing a very slow comeback. The largest increases, between 1997 and 1998, include walking, driving for pleasure, cultural site visitation and jogging while the declines have been in tennis, rowing, and bird watching. Almost all of the activities show an increase in activity. This indicates the same people are doing more or more of the population is enjoying the outdoors.

What does this mean? These trends provide guidance on the type of recreation activities one should consider when investing in or promoting recreation. Landowners or communities near population growth areas (60-150) or have the necessary nature-based recreation resources on the farm have the beginnings for a sustainable recreation business.

Table 1. Outdoor Recreation Participation and Percent Change in the Past Year
(% Of American adults 16 years and older)

Activity	1994	1995	1996	1997	1998	Pct from 1997
Walking for fitness/recreation	NA	45	39	42	47	+5
Driving for pleasure	40	36	33	34	39	+5
Swimming	35	31	28	31	33	+2
Picnicking	33	29	24	26	30	+4
Fishing	26	24	22	20	22	+2
Bicycling	21	20	16	19	19	-
Visiting cultural sites	NA	NA	12	14	18	+4
Hiking	18	18	12	15	17	+2
Wildlife viewing	18	15	10	14	16	+2
Running/jogging	19	16	13	12	16	+4
Outdoor photography	15	15	10	13	15	+2
Campground camping	16	16	12	12	15	+3
Golf	11	12	11	11	12	+1
Bird watching	14	11	8	11	10	-1
Back packing	13	12	8	7	10	+3
Motor boating	10	9	5	8	9	+1
RV camping	8	8	6	7	7	-
Hunting	8	7	7	5	7	+2
Off road vehicle	5	5	5	5	7	+2
In-line skating	NA	4	4	5	6	+1
Tennis	9	9	7	8	5	-3
Downhill skiing	6	6	5	5	5	-
Canoeing/kayaking	6	5	4	5	5	-
Target shooting	8	6	5	4	5	+1
Personal water craft (e.g. jet skis)	NA	NA	NA	3	5	+2
Motorcycling	7	5	6	4	4	-
Horseback riding	6	5	5	4	4	-
Mountain biking	5	5	4	4	4	-
Water-skiing	6	6	3	4	4	-
Rock climbing	4	4	3	3	4	+1

Sailing	4	3	3	3	2	-
Snorkeling	4	3	3	3	3	-
Cross-country skiing	2	3	2	2	2	-
Snowmobiling	2	3	2	1	2	+1
Rowing	3	2	1	2	1	-1
Snowboarding	NA	NA	NA	NA	1	-

Source: American Recreation Coalition

How people feel about their outdoor recreation activity is very important when predicting trends. The American Recreation Coalition developed a "Recreation Quality Index (RQI) to assist them in evaluating outdoor recreation activity. Table 2 shows how people feel about their recreation activity from 1994 to 1998. The "opportunity" score is a measure of the availability or access to a particular activity. The "satisfaction" score is how pleased the individual is with the activity or experience. "Participation" score is a measure of the frequency of performing that outdoor recreation activity. The overall score has increased 5 percent while the opportunity score has been relatively stable. The satisfaction score shows the most variation with a drop of seven since 1997 and 10 points from 1996. The "overall" RQI is an average score of opportunity, participation, and satisfaction ratings. Table 2 shows there is a need for more outdoor recreation opportunity which is more easily accessible because people are not as satisfied with the experience and opportunities are not readily available.

Table 2: Recreation Quality Index (RQI)*

Year	Overall RQI	Opportunity Score	Participation Score	Satisfaction Score
1994	100	100	100	100
1995	107	99	103	119
1996	109	101	105	120
1997	104	102	94	117
1998	105	100	105	110

Other major findings of the survey include a 1998 increase of 4 percent in outdoor recreation; and 26 percent of the Americans believe that they will be taking part in more outdoor recreation than they have in the past year. Local parks and recreation areas were rated "excellent or very good" by 46 percent of the people.

A complete picture of the recreationist includes shopping as well as the physical activity of recreation of a high Recreation Quality Index. The Travel Industry of America 1997 survey showed 33 percent of the travel population included shopping as part of the trip. This provides an excellent opportunity for the farm, ranch, and rural community to economically benefit from providing this type of service to the traveler through local crafters or merchandisers.

What does this mean? The key words to focus on for agritourism and recreation activities includes: 54 percent of the public are not satisfied with outdoor recreation facilities in their area; people's satisfaction score has declined indicating the public wants something more exciting, teaches values, learning, fun, or interpersonal experience; and more convenient or easily accessible. The decline in some of the traditional sports such as hunting but the continued interest in driving and walking supports the mix of the oldest and newest recreation activities discussed above. And, shopping is a standard part of tourism.

Agritourism and Recreation Trends—Today and in 2050

Purpose of tech note: This tech note is to assist in providing guidance to the public who is interested in developing recreation activities on their farms, ranches and in their rural communities.

U.S. Tourism Industry—Today and Tomorrow!

(A summary of the address given by Dr. Lalia Rach
Dean of the Center for Hospitality, Tourism and Travel Administration,
New York University, New York City, New York at the
National Extension Conference, Hershey, PA, May 1998.)

What is the state of tourism at the Federal level? It is appalling!! The U.S. is the only country that does not have an agency devoted to tourism. There are many agencies devoted and involved in tourism. The tourism industry, as big as it is, does not have a federal advocate to promote USA or greet our customers. A national discussion on the place of tourism in the economy is needed.

Competition is increasing worldwide. Vietnam, South Africa, Poland, and Antarctica are hot destinations. Every state is competing for a share of this industry. A New York City luxury hotel has a 97 percent occupancy rate. This is unheard of in the hotel business. Everyone is enjoying the good times.

Future trends in tourism must be done by looking at the changes of the past three decades. In the 1960's, tourists rarely flew. It was "See the USA in your Chevrolet" with Mom, Dad and 2.1 kids in a station wagon. Now we fly as function of time and not expense. "Peanuts were an appetizer—Now they are the meal!"

Home was a refuge from work 30 years ago. Now, it is an extension of the office so one is available 24 hours a day-seven days a week. (We work one more month per year today compared to 30 years ago.) Americans have to plan to relax at home now! The home is the most "mixed-use" development in the country. Leisure-based tourism facilities should look at this today as part of the planning process.

Niche markets are flourishing! Single adventurer travelers, single senior travelers, grandparent/grandchild weekends, cultures, heritage, etc. Almost two thirds of the U.S. households have no children under 18 and only 55 percent of the households with married couples. Agritourism and recreation destinations need to recognize this growing market of childless couples and single tourists.

Today's traveler is more sophisticated, more demanding and more overwhelming than ever. Tourist experiences are the fuel for unique experiences again and again. This is an opportunity to the agritourism and recreation industry. Rural areas can provide a unique, different and a new experience each time.

Loyalty of the customer will require the destination-- to do the right thing and do it with consistency! A desk clerk must do it right—it's the first one you meet. Today's traveler is very experienced and has a sound frame of reference.

Baby Boomers generation and their children- the "echo boomers" are driving the tourism industry today and tomorrow! The current lifestyle story is a 4-year old telling his parents we can go to Disney World for the birthday party. Question is what do you do on the 6th birthday!! Or, even the 10th birthday!!!

Here are some of the characteristics of the tourists—today and tomorrow:

- People are blending work and leisure.
- Destinations need to help the businessperson to relax on free time.
- Boomers are packing more into their vacations—golf, palm pilots.
- Leisure time is named—quality time, gym break and power nap.
- Boomers toys are complex—not just any bike but a mountain bike with special equipment, safety, clothing, etc and the "destination" better deliver a quality experience.
- Boomers go to much more trouble to have fun.
- Multi-generation destination activities are needed.
- Boomers must be indulged every step of the way and are not readily going to give up their status.
- Death to any destination that treats boomers as today's senior citizens.
- Boomers love ethnic and unusual cuisine, different cultures and adventure travel.
- Boomers grew up with the Mustang and they are not ready to get into buses as today's senior citizens do.
- Boomers have been indulged all the way along and today, because of stress, they want to be indulged even more.
- Money is no object! We know what we want and are willing to pay for it.

Agritourism and recreation industry destinations that understand what this large, rich cohort wants and can deliver it is the destination that will profit from tourism in the early decades of the next century.

Recreation and Tourism Dollars

Tourism is big business in every state and the nation. In 1998, travel and tourism contributed over $502 billion to the U.S. economy. It is third largest retail industry—right behind automotive dealers and food stores. Travel and tourism supported more than 7 million jobs and indirectly support another 9.2 million jobs, creating a total of 16.2 million jobs. (Source: 1998 Tourism Works for America Report). It generates $34 billion in shopping revenues. International tourism decreases the nation's trade deficit by $25 billion. These revenues translate into a saving of $710 in federal income tax per household.

General Recreation Activity Levels—1994-95

Source of Information: The following sections are based on the information published in "Outdoor Recreation in American Life: A National Assessment of Demand and Supply Trends," H. Ken Cordell, Principal Investigator, USDA Forest Service, Southern Research Station, Athens, GA

The results shown here are based primarily on the 1994-95 National Survey on Recreation and the Environment (NRSE) or earlier versions. Thirteen basic types of recreation activity were surveyed. It showed an estimated 95 percent of the U.S. population 16 years or older participated in one or more recreation activity in 1994-95 compared to 89 percent in 1982-83.

The four most popular activities were:

Walking	66.7 percent
Viewing a beach or waterside	62.7 percent
Family gatherings outdoors	61.8 percent
Sightseeing	56.6.percent

The 13 most popular types of activities include:

- viewing-and learning-oriented activities, such as bird watching,
- trail, street, and road activities such as biking,
- social activities,
- spectator activities (including outdoor concerts), and
- swimming in pools and natural waters.

The percent of the population participating in these 13 activities are shown in Table 1.

Land-Based Activities

Land-based activities are divided into the following categories: Trail/Street/Road—5 activities, Viewing/Learning—8 activities, Camping—7 activities, Hunting—3 activities, Outdoor Adventure—11 activities, and Social--2 activities. The percent of population 16 years and older participating in the 36 different activities is shown in Table 2. Over 50 percent of the population participated in walking, sightseeing, and family gathering activities. Twenty five to 49.99 percent of the population participated in running/jogging, biking, visiting a nature center, visiting a visitor center, visit historic site, bird watching, wildlife viewing, and picnicking activities. Less than 5 percent of the population participated in long distance biking, RV primitive camping, migratory bird hunting, orienteering, backpacking to a summit, mountain climbing, rock climbing, and caving activities.

Water-Based Activities

Water-based activities are divided into Boating/Floating—11 activities, Fishing—7 activities, Swimming—4 activities, and Viewing—3 activities. The most popular activities are motor-boating, warm water fishing, swimming in pools, swimming in non-pools, and visiting a beach or waterside (62 percent) which is considerably higher than any of the other activities. The percent of the population 16 years old or over participating in these activities are shown in Table 3.

Snow-and Ice-Based Activities

Snow-and ice-based activities are divided into Downhill skiing—3 activities, Cross Country Skiing—3 activities, All Skiing Forms, Ice Skating, and Snowmobiling. The most popular is sledding. The percent of the population 16 years and older participating in these activities are shown in Table 4.

What does this mean? Tables 1, 2, 3 and 4 provide valuable information for farmers, ranchers and rural communities in determining which recreation enterprises or combination of recreation enterprises to develop and how to market/promote their business. A community establishing a recreation destination would what to develop a plan that would provide those recreation activities people like the most. This information is also important when making a natural resource assessment of a farm, ranch or community. Also, what types of activities to combine such as sledding (20 million people do it!) with a snow-based landscape or B&B, farm or ranch stay. Beautiful landscapes for viewing, hiking and walking are key activities. On the other hand, unique landscapes such as rock climbing, hand gliding, caves or other natural resource features would need to be considered as a recreation enterprise. Any recreation plan should utilize as many of the natural resource features as possible to help the public enjoy their outdoor recreation experience. Knowing the most popular public recreation activities will help develop marketing packages that promotes all of these in a community such as walking, birding, hiking, sightseeing, learning. This will extend the stay on the farm, ranch or in the rural community.

Recreation Trends: 1982-83 to 1994-95

Outdoor recreation trends are based upon the changes in participant activity captured in the NSRE surveys for 1982-83 and 1994-95. Percent changes and participation in land, water and snow/ice-based activities and outdoor sports are shown in Table 5. One needs to look at both the changes in the millions of people as well as the percentage change in participation. Bird watching showed the largest increase of 155 percent. Bird watching also had one of the highest rises in millions of participants (32 million), second only to walking, which had an increase of 40 million and a 43 percent increase.

Horseback riding, hunting, fishing, sailing, ice skating, and tennis all declined over this time period.

What does this mean? An assessment of the natural resources on a farm, ranch or rural community will need to be used to develop agritourism, recreation or alternative enterprise activities that are in popular demand. For example, the presence of fish and wildlife may be a popular recreation activity for local hunters and anglers, but as a nation they are declining recreation activities. Alternative, more popular, recreation activities would include viewing, photography, and other non consumptive more popular recreation activities. Thus, a marketing plan would need to be developed to reach both types of customers or a particular type depending on the landowner's or community's wishes.

2050 Outdoor Recreation Projections

Future recreation outdoor participation and consumption were estimated for 2050 by the Forest Service as mandated by the Renewable Resources Planning Act (RPA). National estimates are provided for three categories—(1) activity days, (2) primary purpose, and (3) number of people. The key findings are:

Activity Days--Five fastest growing outdoor recreation activities through the year 2050 measured in *activity days* are expected to be: visiting historic places (116 percent growth), downhill skiing (110 percent growth), snowmobiling (99 percent growth), and non consumptive wildlife activity (97 percent growth). The five slowest growing outdoor recreation activities through the year 2050 as measured in activity days are expected to be fishing (27 percent growth), primitive camping (24 percent growth), cross-country skiing (18 percent growth), off-road vehicle driving (seven percent growth), and hunting (minus-two percent growth).

Primary Purpose--The fastest growing activities are different when measured in terms of *primary purpose* of the trip. Then, the five fastest growing outdoor recreation activities are excepted to be: downhill skiing (122 percent growth), biking (116 percent growth), snowmobiling (110 percent growth), sightseeing (98 percent growth), and developed camping (80 percent growth). The five slowest growth areas are expected to be; hunting (six percent growth), primitive camping (zero percent growth), off-road vehicle driving (minus 22 percent growth), family gatherings (minus 25 percent growth), and picnicking (minus 45 percent growth).

Number of People—The *number of people* participating in outdoor recreation activities gives a good indication of the level of activity which differs from both the primary purpose and activity days. The five fastest growing activities are expected to be: cross-country skiing (95 percent growth), downhill skiing (93 percent growth), visiting historic places (76 percent growth), sightseeing (71 percent growth), and biking (70 percent growth). The five slowest growing activities as measured in number of people participating are expected to be: rafting (26 percent), backpacking (26 percent growth), off-road vehicle driving (16 percent), primitive camping (10 percent), and hunting (minus 11 percent).

Other major prediction findings included:

- Race and sex are important. White males engage more in winter, water-based, hunting, and dispersed land activities. Females engage in horseback riding, picnicking and non consumptive wildlife activity. Race is not a factor in fishing, walking, picnicking or non consumptive wildlife recreation activities.

- Population density has a strong negative relationship on more rural type activities like fishing, horseback, riding, hunting, motor boating, off-road vehicles driving, and primitive camping.

- Income has a very strong relationship with the more expensive recreation activities like downhill skiing, snowmobiling, horseback riding, motor boating, and sightseeing.

What does this mean? These data may be used in several ways. If you are located in an area where the natural resources provide the base for the fastest growth outdoor recreation activities, two choices are available for agritourism, recreation and alternative enterprises. First, one or more of the fastest growth outdoor recreation activities can be developed on privately owned or community-owned land, or second, provide participant services (B&B, food, repair shops) or other activities (shopping, movies, country markets) for the "fast growth" activities on public land.

Table 1: Percent and Number of People 16 Years and Older in the U.S. Participating in 13 Types of Outdoor Recreation Activities, 1994-95

Type of outdoor activity	Percent of population 16 or older	Number in millions
Participated in any type of activity	94.5	189.3
Trail/street/road activities	68.3	136.9
Individual sports	22.0	44.1
Team sports	26.4	53.0
Spectator activities	58.7	117.6
Viewing/learning activities	76.2	152.6
Snow and ice activities	18.1	36.3
Camping (all overnight)	26.3	52.8
Hunting	9.3	18.6
Fishing	28.9	57.9
Boating/floating	29.0	58.1
Swimming	54.2	108.6
Outdoor adventure activities	36.8	73.6
Social activities	67.8	135.9

Source: 1994-95 National Survey on Recreation and the Environment, USDA Forest Service and the University of Georgia, Athens, Georgia. The NSRE is the most recent of the series of National Recreation Surveys begun nationally in 1960.

Table 2: Percent and Number of People 16 Years and Older in the U.S. Participating in Land-Resource-Based Outdoor Activities, 1994-95

Type of outdoor activity	Percent of population 16 or older	Number in millions
Trail/Street/Road Activities		
Running/jogging	26.2	52.5
Biking	28.6	57.4
Long distance biking	3.2	6.4
Walking	66.7	133.7
Viewing/Learning Activities		
Visiting a nature center	46.4	93.1
Visiting a visitor center	34.6	69.4
Visit a prehistoric site	17.4	34.9
Visit a historic site	44.1	88.4
Bird-watching	27.0	54.1
Wildlife viewing	31.2	62.6
Other wildlife viewing	13.8	27.5
Sightseeing	56.6	113.4
Camping		
Developed area	20.7	41.5
RV developed camping	8.6	17.3
Tent developed camping	14.6	29.4
Primitive area	14.0	28.0
RV primitive camping	3.5	7.1
Tent primitive camping	10.7	21.5
Other camping	2.1	4.2
Hunting		
Big game	7.1	14.2
Small game	6.5	13.0
Migratory bird	2.1	4.3
Outdoor Adventure		
Hiking	23.8	47.8
Hiking to a summit	8.3	16.6
Orienteering	2.4	4.8
Backpacking	7.6	15.2
Backpacking to a summit	3.3	6.6
Mountain climbing	4.5	9.0
Rock climbing	3.7	7.5
Caving	4.7	9.5
Off-road driving	13.9	27.9
Horseback riding	7.1	14.3
Horseback riding on trails	5.2	10.4
Social Activities		
Picnicking	49.1	98.3
Family gathering	61.8	123.8

Source: 1994-95 National Survey on Recreation and the Environment, USDA Forest Service and the University of Georgia, Athens, Georgia. The NSRE is the most recent of the series of National Recreation Surveys begun nationally in 1960.

Table 3: Percent and Number of People 16 Years and Older in the U.S. Participating in Water-Resource-Based Outdoor Activities, 1994-95

Type of outdoor activity	Percent of population 16 or older	Number in millions
Boating/Floating		
Sailing	4.8	9.6
Canoeing	7.0	14.1
Open-top canoeing	6.8	13.5
Closed-top canoeing	0.4	0.8
Kayaking	1.3	2.6
Rowing	4.2	8.4
Floating, rafting	7.6	15.2
Motor-boating	23.5	47.0
Water skiing	8.9	17.9
Jet skiing	4.7	9.5
Sailboarding/windsurfing	1.1	2.2
Fishing		
Freshwater	24.4	48.8
Saltwater	9.5	19.0
Warmwater	20.4	40.8
Coldwater	10.4	20.8
Ice	2.0	4.0
Anadromous	4.5	9.1
Catch and release	7.7	15.5
Swimming		
Surfing	1.3	2.6
Swimming/pool	44.2	88.5
Swimming/non-pool	39.0	78.1
Snorkeling/scuba	7.2	14.5
Viewing Activities		
Fish viewing	13.7	27.4
Visiting a beach or waterside	62.1	124.4
Studying nature near water	27.6	55.4

Source: 1994-95 National Survey on Recreation and the Environment, USDA Forest Service and the University of Georgia, Athens, Georgia. The NSRE is the most recent of the series of National Recreation Surveys begun nationally in 1960.

Table 4: Percent and Number of People 16 Years and Older in the U.S. Participating in Snow-and Ice-Based Outdoor Activities, 1994-95

Type of outdoor activity	Percent of population 16 or older	Number in millions
Downhill Skiing		
Snowboarding	2.3	4.5
Sledding	10.2	20.5
Downhill skiing	8.4	16.8
Cross Country Skiing		
On groomed trails	2.7	5.4
On ungroomed trails	2.8	5.7
Back country	1.9	3.7
All forms	3.3	6.5
Ice skating	5.2	10.5
Snowmobiling	3.6	7.1

Source: 1994-95 National Survey on Recreation and the Environment, USDA Forest Service and the University of Georgia, Athens, Georgia. The NSRE is the most recent of the series of National Recreation Surveys begun nationally in 1960.

Table 5: Millions and Percentage Change of Persons 16 Years or Older Participating at Least Once in 12 Months in Land, Water, Snow/Ice, and Other Activities in the United States, 1982-83 and 1994-95.

Resource Base and Activity	Number in Millions 1982-83	Number in Millions 1994-95	Percent Change
Land-resource-based activities			
Bird watching	21.2	54.1	+155.2
Hiking	24.7	47.8	+93.5
Backpacking	8.8	15.2	+72.7
Primitive area camping	17.7	28.0	+58.2
Off-road driving	19.4	27.9	+43.8
Walking	93.6	133.7	+42.8
Sightseeing	81.3	113.4	+39.5
Developed area camping	30.0	41.5	+38.3
Picnicking	84.8	98.3	+15.9
Running/jogging	45.9	52.5	+14.4
Bicycling	56.5	57.4	+1.6
Horseback riding	15.9	14.3	-10.1
Hunting	21.2	18.6	-12.3
Water-resource-based activities			
Motorboating	33.6	47.0	+39.9
Swimming/river, lake, or ocean	56.5	78.1	+38.2
Swimming/pool	76.0	88.5	+16.4
Water skiing	15.9	17.9	+12.6
Fishing	60.1	57.8	-3.8
Sailing	10.6	9.6	-9.4
Snow & ice-resource-based activities			
Downhill skiing	10.6	16.8	+58.5
Snowmobiling	5.3	7.1	+34.0
Cross-country skiing	5.3	6.5	+22.6
Sledding	17.7	20.5	+15.8
Ice skating	10.6	10.5	-0.9
Outdoor sports & spectator activities			
Attending an outdoor concert or play	44.2	68.4	+54.7
Attending a sports event	70.7	95.2	+34.7
Golf	23.0	29.7	+29.1
Outdoor team sports	42.4	53.0	+25.0
Tennis	30.0	21.2	-29.3

Sources: 1982-83 National Recreation Survey, U.S. Department of the Interior and 1994-95 National Survey on Recreation and the Environment, USDA Forest Service.

Outdoor Recreation Demand Trends, Private Land Use and Supply, Potential Recreation Opportunities, and Natural Resource Conservation Attitudes

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INTRODUCTION

All forms of outdoor recreation are increasing in popularity, especially ecotourism and birding. Recent surveys show that people want to get back to the land and associate themselves with farm-based activities. More people are participating in agriculture-based recreation events such as apple and cherry blossom events, pumpkin harvesting, picking or purchasing fresh/processed produce, and other farm/ranch activities. A perfect example is the explosion of farmer's markets across the country in both urban and rural communities.

Farmers, ranchers, and rural communities have been developing agritourism, recreation and alternative enterprises to economically sustain themselves throughout history. Street markets in small rural villages were probably the first enterprises followed by deliveries in towns and cities. In the 20th Century, a number of the agricultural alternative enterprises became recreation based rather than food based. The first recreation alternative income-producing enterprises were mainly natural resource based--hunting (first the fox and hound and now dog and gun), fishing, maple syrup, and fresh produce beginning at the turn of the Century. Individual farmers/ranchers and the communities have added many more nature-based enterprises since then such as adventure climbing, sky diving, on-farm/ranch experiences, cultural heritage appreciation, birding, nature-based tourism, scenic/history tours, off road trails for bikes and snowmobiles, and festivals to name a few of the latest and fastest growing recreation experiences. Many farmers and ranchers are also entering into bed and breakfast, farm dinners, craft making/sales, value added products and other on-farm experiences. The multiple use of the natural and other on farm resources have economically sustained farmers/ranchers and rural communities. The 1996 Farm Bill has many farmers/ranchers breaking from the "tradition" of selling only livestock, crops, and timber to increasing their profits by selling a service, adventure experience, or valued added agricultural products. Requests to Natural Resources Conservation Service, other USDA agencies, and private groups by farmers/ranchers seeking alternative enterprise or product value added information has increased 3-5 fold in past 3 years.

This presentation will cover three major areas of agritourism and recreation: (1) outdoor recreation demand trends; (2) supply of recreation on privately owned lands (POL); and (3) private landowners attitudes about conservation on farms and ranches.

OUTDOOR RECREATION DEMAND

The American Recreation Coalition initiated its annual survey in 1994 of 2,000 people. This annual survey gives an indication of how recreation demand is changing in the United States. The "Outdoor Recreation in America 1998" survey shows continuing upward trends in outdoor recreation. These trends are shown for 1994 to 1998 in Table 1 for that percent of the population participating in 35 activities for adults 16 years and older. The significant changes since 1994 were as high as a 7 percentage point drop between 1994 and 1996 but a five percentage point increase between 1997 and 1998 in "driving for pleasure." A similar swing occurred for fishing, picnicking, hiking, jogging and others. However, several of these regained their losses by 1998, except for fishing, and jogging which show a very slow comeback. The largest increases, between 1997 and 1998, include walking, driving for pleasure, cultural site visitation and jogging while the declines have been in tennis, rowing, and bird watching. Almost all of the activities show an increase which indicates the same people are doing more or more of the population is enjoying the outdoors.

These trends provide guidance on the type of recreation activities one should consider when investing in or promoting recreation. Landowners or communities near population growth areas or have the necessary nature-based recreation resources on the farm have the basis for a sustainable recreation business. As the next table will show, there is a need for more outdoor recreation opportunity.

Table 1. Outdoor Recreation Participation and Percent Change in the Past Year (% of American adults 16 years and older)

Activity	1994	1995	1996	1997	1998	Pct from 1997
Walking for fitness/recreation	NA	45	39	42	47	+5
Driving for pleasure	40	36	33	34	39	+5
Swimming	35	31	28	31	33	+2
Picnicking	33	29	24	26	30	+4
Fishing	26	24	22	20	22	+2
Bicycling	21	20	16	19	19	-
Visiting cultural sites	NA	NA	12	14	18	+4
Hiking	18	18	12	15	17	+2
Wildlife viewing	18	15	10	14	16	+2
Running/jogging	19	16	13	12	16	+4
Outdoor photography	15	15	10	13	15	+2
Campground camping	16	16	12	12	15	+3
Golf	11	12	11	11	12	+1
Bird watching	14	11	8	11	10	-1
Back packing	13	12	8	7	10	+3

Motor boating	10	9	5	8	9	+1
RV camping	8	8	6	7	7	-
Hunting	8	7	7	5	7	+2
Off road vehicle	5	5	5	5	7	+2
In-line skating	NA	4	4	5	6	+1
Tennis	9	9	7	8	5	-3
Downhill skiing	6	6	5	5	5	-
Canoeing/kayaking	6	5	4	5	5	-
Target shooting	8	6	5	4	5	+1
Personal water craft (e.g. jet skis)	NA	NA	NA	3	5	+2
Motorcycling	7	5	6	4	4	-
Horseback riding	6	5	5	4	4	-
Mountain biking	5	5	4	4	4	-
Water-skiing	6	6	3	4	4	-
Rock climbing	4	4	3	3	4	+1
Sailing	4	3	3	3	2	-
Snorkeling	4	3	3	3	3	-
Cross-country skiing	2	3	2	2	2	-
Snowmobiling	2	3	2	1	2	+1
Rowing	3	2	1	2	1	-1
Snowboarding	NA	NA	NA	NA	1	-

Source: American Recreation Coalition

How people feel about their outdoor recreation activity is very important when predicting trends. The American Recreation Coalition developed a "Recreation Quality Index (RQI) to assist them in evaluating outdoor recreation activity. Table 2 shows how people feel about their recreation activity for 1994 to 1998. The "opportunity" score is a measure of the availability or access to a particular activity. The "satisfaction" score is how pleased the individual is with the activity experience. "Participation" score is a measure of the frequency of performing that outdoor recreation activity. The overall score has increased 5 percent while the opportunity score has been stable. The satisfaction score shows the most variation. The "overall" RQI is an average score of opportunity, participation, and satisfaction ratings.

Table 2: Recreation Quality Index (RQI)*

Year	Overall RQI	Opportunity Score	Participation Score	Satisfaction Score
1994	100	100	100	100
1995	107	99	103	119
1996	109	101	105	120
1997	104	102	94	117
1998	105	100	105	110

OUTDOOR RECREATION SUPPLY

Outdoor recreation occurs on Federal and private land. Federal land capacity is approaching its limit in many parts of the country. Private lands will need to provide this recreation supply and much of it has the unique location advantage of being next door to the user (population centers). It is not always necessary to travel to Disney World or the high mountains of Colorado. Being nearby the user makes recreation an income-producing opportunity for the private land owner.

The conversion of land to recreation uses is an indicator of how the supply is increasing. In 1982 and 1992, the National Resources Inventory estimated the number of non-federal acres of cropland converted to developed land uses to be 4.2 million acres or four percent of the cropland base. The percent of the land converted to recreation by NRCS region was: West-5 percent (out of 557,200 acres), Northern Plains 3 percent (out of 360,100 acres), South Central 3 percent (out of 438,000), Midwest 5 percent (out of 1,136,400), East 5 percent (out of 528,200), and the Southeast 2 percent (out of 1,141,100). Since this is the percent of cropland converted to recreation uses, it excludes forest land and Federal land. Thus, these estimates are the lower bound of land being used for recreation. Also, it is necessary to consider the number of cropland acres in each region because the Midwest region has considerably more cropland than the West and is reflected in the higher percentage value for the West.

The third National Private Landowners Survey (NPLOS) conducted by the Forest Service and Natural Resources Conservation Service (NRCS) obtained data on how land owners were using their land for recreation in 1995-96. These data were collected by surveying 13,000 farmers, ranchers and other private landowners. The results are available for the nation and the six NRCS regions. More detailed and NRCS regional information can be found in "Outdoor Recreation in American Life: A National Assessment of Demand and Supply," H. Ken Cordell, Forest Service. It addresses why landowners allow recreation on their land, why they control the use of recreation on their property, how they control the recreation, what are the benefits, and trends in the use or supply of privately owned land for recreation.

Most of the questions asked private landoweners (PLO) permitted them to select more than one reason for allowing recreation on their land. Thus, the total percentage shown may 100 percent in some tables. This allowed a better understanding of the reasons farmers and ranchers permit recreation on their land. Each percent value is a measure of the number of times the survey respondents identified that reason for permitting recreation on their land.

Private land Owners (PLO) were asked to identify the reason(s), as shown in Table 3, why they allow people on their land to hunt, fish or do other outdoor recreation activities. The most popular reason was "goodwill." Some of the questions were asked in several ways and the answers sometimes appear in contradiction. For example, most PLO indicted recreation as a "source of income" was insignificant while 3.3 percent said they used it to protect the land, 2.9 percent indicated it helped to pay taxes and .6 percent said it was a primary source of income. This shows the landowners perspective was on how it helped achieve land care and cover costs rather than an in-the-bank cash benefit.

Table 3: Reasons for Allowing Recreation on Land, Percentage by Type, 1995-96

Maintain good will with neighbors and others----41.2 percent
Help control trespassing------------------------------8.4 percent
Help care for and protect my land-------------------3.7 percent
Helps pay the taxes------------------------------------2.9 percent
Primary source of income------------------------------0.6 percent
Extra income--insignificant
Other reasons---15.5 percent

Access to recreation on privately owned lands has always been a concern of outdoor recreation enthusiasts, ranging from hunting and fishing to hiking and bird watching. One of main reasons for allowing people on the land is "good will" as noted in Table 2. The second major reason was control of trespassers. By allowing people to use your land, they become your partners in controlling the trespassers, thus the land owner is aware of who is using his land. This is supported by the data in Table 4 which shows 49 percent of the landowners permit immediate family and another 49 percent of the landowners permit others they personally knows use the land for recreation.

Table 4: Access to Land by Family Type

Immediate family with different residence----- ----49.4 percent
Not immediate family but personally known------ 49.0 percent
Members of clubs, organizations who lease---------5.1 percent
Persons you may or may not know-----------------11.9 percent

PLO were asked why they leased their farms and ranches for recreation. Over 60 percent of the PLO stated "controlling of trespassing or unwanted use" was one of the reasons they leased their land. This finding is supported by the results of Table 3. Income, payment of property taxes, and goodwill are also important reasons for leasing. Caring for the land, through leases, is also very important. Some of this is explained by the fact that leasing organizations, or individuals and/or the PLO carry out conservation practices to enhance the wildlife benefits of the land for recreation and thus increasing the lease value. These results vary regionally as one would expect.

Table 5: Reasons for Leasing Land

Source of income---------------------------14.8 percent
Pay property taxes--------------------------74.5 percent
Extra income---------------------------------39.4 percent
Control trespassing or unwanted use-----60.7 percent
Maintain goodwill----------------------------25.3 percent
Help care for and protect land-------------52.0 percent
Other---0.1 percent

Verbal and written agreements with the recreation user are the most popular leasing agreement. Ninety two percent of the PLO use written or verbal agreements with a fee. Thus, most privately owned land, that is leased, is for a fee. Only 7.7 percent of the PLO lease their land without a fee in 1995-96. It is difficult to resolve the difference between the results of Table 6 and those of Table 3 where the income was not cited as a major reason to permit recreation on the land, but most land is leased for a fee.

Table 6: Lease Agreements

Written agreement with fee--------------68.6 percent
Verbal agreement with fee---------------23.4 percent
Written agreement with no fee------------5.3 percent
Verbal agreement with no fee-------------2.4 percent
Other---0.3 percent

Access for hunting, fishing, walking, hiking and etc. on private lands has always been a concern of outdoor recreation people, recreation industry and the local community. This access control is very visible in may areas where land is posted. To better understand posting, the PLO were asked why they posted their land. More than one reason could be given for posting the land. The most popular reason for posting was knowing who was on your property as 39 percent of the PLO selected it. Other reasons identified by the PLO related to control of access or keep out people you don't know, and prevention of property damage. Twenty nine percent of the PLO said they just wanted to keep hunters out. Generally, posting is done for knowledge and not to keep hunters out.

Table 7: Reasons for Posting Land

Know who is on the property---------------- 39.1 percent
Keep people out with no permission--------- 37.7 percent
Keep out people I don't know---------------- 33.8 percent
Prevent damage to livestock and property--- 30.9 percent
Keep hunters out--------------------------------29.3 percent

Farmers and ranchers are looking to recreation as another income-producing enterprise which makes use of the nature resources on their property. But, when they do so, they are going to continue to exert control over who is on the land and how the land and property is treated. To determine what the future holds, the PLO were asked if they intended to increase or decrease the amount of land available for recreation compared to what they are doing today. For the year 2000, the majority (84 percent) would not change, 13 percent indicated they would limit access to their property for recreation and 3 percent said they would do more (Table 8). When you compared this to what they were doing in 1990, 5 percent of the PLO said they were doing more. Thus, at a time when demand for recreation is increasing, the amount of land being made available has declined by 2 percent (5 percent minus 3 percent).

Table 8: Recreation Use Trends on Land in 1995 compared to 1990 and 2000

Year	More	Same	Less Than 1995-6
		Percent	
1990	5.0	88.2	6.8
2000	3.0	83.7	13.3

CONSERVATION ATTITUDES

PLO are interested in conserving the environment based upon the above results of using recreation income to protect the land. The next set of data describes five kinds of values and opinions of how landowners feel about protecting the land and improving the natural resources. Private landowners were asked what their attitude was concerning the environment, private property rights, limiting growth, and ruling over plants and animals. The PLO was asked to: a) strongly agree, 2) agree, 3) neutral, 4) disagree, and 5) strongly disagree with the questions. The next five tables show the results at the national level and for the six NRCS regions. Regional differences range as much as 10 percentage points as can be noted in the tables below.

The percent value in the tables indicate what percent of the 13,000 landowners responding to the question Strongly agree, Agree, Neutral, Disagree, or Strongly disagree.

Landowners were asked whether people are responsible for nature and the environment. To accomplish this, they must have control over nature, plants and animals. About 50 percent of the PLO agreed, 20 percent were neutral and 30 percent disagreed. Those disagreeing indicates that plants and animals have preference over people which is also the group with the greatest regional variation. This is not surprising given the value of individual property rights in the ranching areas of South Central and Western U.S.

Table 9: Landowners Agreeing that People Must Rule Over Nature, Plants and Animals that are Here for Our Use.

National	East	South	Midwest	Northern	South	West

			East		Plains	Central		
Strongly Agree	17.4	17.9	18.5	14.6	17.2		22.5	16.4
Agree	31.4	22.8	31.0	32.9	31.1		35.3	38.1
Neutral	19.3	14.3	18.5	18.6	22.6		12.2	23.3
Disagree	17.5	19.9	18.1	17.7	20.1		11.1	16.7
Strongly Disagree	14.3	25.2	13.9	16.2	9.0		8.0	5.5

Land preservation and development have always been in conflict but not nearly as much as in the past few decades. PLO are a major beneficiary of development or growth, however this conflicts with their values of preserving the rural life and the environment. Over two-thirds of the PLO agreed that growth should be limited in favor of nature. This value was the strongest in the East (77 percent) where open space is an everyday issue in the most densely populated states and is a significant part of every development plan. A lower percentage of the people in the West (60 percent) agreed. This could be attributed to the vastness of the land with mountains and deserts compared to the density of the people. Table 10 shows the regional distribution patterns.

Table 10: Landowners Agreeing that the Balance of Nature is Delicate and We Must Limit Economic Growth that Exploits Nature

	National	East	South East	Midwest	Northern Plains	Central	South	West	
Strongly Agree	26.0		29.6	26.4	28.0	25.9		22.1	17.3
Agree	44.1	48.2	46.8	42.8	43.7		36.1	43.9	
Neutral	17.8	14.2	17.0	17.8	15.8		25.0	19.2	
Disagree	8.2	6.0	4.9	9.0	11.3		10.5	12.3	
Strongly Disagree	4.0	2.0	4.9	2.4	3.3		6.2	7.3	

Property rights have always been valued highly by PLO in the U.S. It is generally the strongest in the west, stemming from the pioneer days, open cattle ranching days of the 1800's, and the importance of freedom and independence in the U.S. To determine how PLO cherish this value, three questions were asked about property rights and conservation of natural resources and environment. First, the PLO was asked whether a land owner could do as they pleased to the land regardless of its effect on the environment (Table 11); second, property rights are important but only if it doesn't hurt the environment (Table 12) ; and third, property rights should be limited to preserve the environment (Table 13).

Table 11 shows that 66 percent of the PLO agreed they had the right to do as they please regardless of the effect on the environment. This indicated a very strong value position for total freedom. The East NRCS region reported the highest at 74 percent agreeing one can does as they pleased. This is the same region that showed the strongest position to limit growth (Table 10) in order to protect the environment. This indicates that the environment is important but do not tell me what I can do with my property. It is the typical case of it is OK for the property down the road, but not on my land. The South Central region PLO disagreed that a land owner can do as they please to the environment. Similar comparisons can be made for the other regions.

Table 11: Landowners Agreeing that Private Landowners have the Right to do as They Please with Their Land Regardless of the Effect on the Environment.

	National	East	South East	Midwest	Northern Plains	South Central	West
Strongly Agree	38.9	48.2	38.2	42.0	33.8	28.5	34.9
Agree	28.2	26.1	27.6	29.3	30.1	26.9	30.4
Neutral	6.0	4.0	7.4	5.6	4.2	7.3	6.3
Disagree	18.5	13.1	19.6	14.6	20.9	26.3	23.4
Strongly Disagree	8.4	8.2	7.3	8.6	11.0	11.0	5.0

Secondly, the PLO were asked another question to better determine their value or attitude about protecting the environment and protecting rights. Except for the West, most landowners agreed that property rights (about 75 percent in the other five regions) are important but only if it did not hurt the environment. This result supports the findings in Table 9 about people ruling over nature and Table 10 that a balance is needed between growth and the exploitation of nature. National and regional comparisons can be seen in Table 12.

Table 12. Landowners Agreeing that Private Property Rights are Important, But Only if Private Property Rights don't Hurt the Environment.

	National	North East	South East	Midwest	Northern Plains	South Central	West
Strongly Agree	42.2	47.3	42.2	45.2	39.2	38.7	32.0
Agree	33.1	31.4	32.7	34.1	36.7	37.1	23.9
Neutral	6.5	4.0	7.3	4.9	5.2	8.5	12.4
Disagree	9.7	10.0	8.9	8.7	10.3	8.7	16.7
Strongly Disagree	8.4	7.2	8.9	7.1	8.6	7.1	15.0

Thirdly, the PLO was asked to put a lower bound on private property rights. They were asked if they should be limited in order to protect the environment. This resulted in the lowest amount of support or agreement of limiting private property rights. This continues to indicate the strong high value for private property rights. Nationally, only 32 percent of the PLO agreed that private property rights should be limited in order to protect the environment. The Midwest NRCS region showed the lowest amount agreeing of 27 percent. Table 13 shows the regional distribution

Table 13: Landowners Agreeing that Private Property Rights be Limited if Necessary to Protect the Environment.

	National	North East	South East	Midwest	Northern Plains	South Central	West
Strongly Agree	17.4	13.0	15.1	15.9	24.1	20.8	23.7
Agree	15.6	16.8	14.5	12.4	17.3	16.8	23.8
Neutral	14.2	10.4	14.1	15.6	17.0	16.4	9.4
Disagree	35.4	42.8	36.6	37.7	26.2	30.8	28.9
Strongly Disagree	15.6	17.0	19.7	18.3	15.5	15.1	14.2

The national results for Tables 9-13 are summarized in Table 14. It shows twice as many landowners (38.9 percent) "strongly agree" that landowners have unlimited rights to do what they wish regardless how it affects the environment compared to 17.4 percent who "strongly agree" the environment should be protected even if it limited property rights. A fourth (26 percent) "strongly agree" that growth should be limited to keep it in balance with nature and the environment. Over 75 percent of the landowners "strongly agreed" or "agreed" that property rights are important but it must be balanced for a "safe environment. During the Soil and Water Resources Conservation Act survey in 1978, farmers and ranchers were asked if federal farm subsidies should be withheld from PLO who did not use proper conservation practices. Over two-thirds of farmers and ranchers stated that federal payments should be withheld if the land is not protected from wind and water erosion. The 1996 results indicate that PLO still hold protection of the environment as being very important. Also, the PLO has a responsibility to protect the environment.

Table 14: Summary of National Results of Tables 9-13 by Question.

Question	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
People Rule Over Nature Table 9	17.4	31.4	19.3	17.5	14.3
Limit Growth for Environment Table 10	26.0	44.1	17.8	8.2	4.0
Unlimited Property Rights Table 11	38.9	28.2	6.0	18.5	8.4
Safe Environment Table 12	42.2	33.1	6.5	9.7	8.4
Limited Property Rights Table 13	17.4	15.6	14.2	35.4	17.5

IV. Conclusion

Outdoor recreation demand is continuing to increase based upon recent surveys. Many of these activities are or could be farm/ranch based. Outdoor recreation participants indicated the lacked of opportunity was one of their greatest needs based upon the RQI index being the lowest for "opportunity." This is an indication that people want to do more. This opens the door for rural communities and ranches/farmers to invited outdoor recreation people. Other surveys have also shown that today's two-income families are taking shorter, but more frequent vacations close to home. About 2-4 hours being the maximum. Both the near-home vacations and the need for more opportunities are factors affecting the demand near population centers.

The supply of privately owned lands for recreation is declining based upon the National Private Landowners Survey for 1995-96. It is expected to decline by 2 percent by 2001 while population continues to grow. This will open the door for income-producing recreation enterprises for those PLO who wish to go into the business.

Some of these are discussed in the next concurrent session titled "Alternative Agricultural Enterprises." I will see you there.

Agriculture/Alternative Enterprise Opportunities, Benefits, Barriers and Recommendations: Results of an Agritourism and Natural Resources Forum

James A. Maetzold, Edward M. Mahoney and John V. Edwards

Abstract: Conservation associations, agricultural production organizations, agri-business groups, rural development organizations, and special interests groups participated in a one-day workshop on alternative enterprises and agritourism. Discussion groups were asked to identify: (1) opportunities and barriers, (2) steps necessary to support and market agritourism; and (3) individuals and organizations interested in partnering with agencies and universities. Four areas were identified: (1) coalitions and partnerships, (2) technical assistance and education programs, (3) financial understanding and cost reduction, and (4) marketing and promotion of agritourism. These results are grouped into eleven categories: sustainable, income, conservation, rural development, politics/public support, partnerships, education, technical assistance, financial assistance, cost reduction, and marketing and promotion. A summary of the 75 items identified by group is presented.

Introduction

The popularity of agritourism and recreation has been increasing rapidly over the past decade. Studies and experience show that the public is looking for adventure, culture, roots, rural settings, hands-on-experience, fresh food, getting back to the farm and in some cases getting to know a farmer that they refer to as "my farmer."

Agritourism has the potential to satisfy these public needs. At the same time it can preserve and sustain family farms, ranches, rural communities, and conserve natural resources. Agritourism enterprises and activities can provide additional income to farmers, ranchers, and the rural community. It can provide the additional supplemental revenue that can make a difference between a profit and a loss for agricultural producers, agri-businesses and the rural community. It is a way to "add value" to crops and livestock currently grown on the farm or ranch. It also has the potential for building relationships and expanding future relationships between agriculture and tourism supporting industries.

Following are definitions or terms are used in this paper:

- Agritourism is defined as any activity where the public is invited to come to the farm.
- Recreation includes all those activities such as U-pick to tubing or photography.
- Alternative enterprises are non-traditional agriculture production or marketing activities and it may or may not involve customers coming to the farm.

Methodology

A forum was held in January 1997 to obtain input from individuals and organizations working at the national level. The participants had to be actively involved in agriculture, natural resource products, recreation and tourism, or conservation at the national level. The forum's goal was to obtain information on: (1) opportunities and barriers to agritourism, recreation and alternative enterprises, (2) steps necessary to support and market agritourism, recreation and alternative enterprise, and (3) individuals and organizations interested in partnering with agencies and universities to this activity in rural areas.

Thirty-eight people attended the one-day forum. They were divided into two facilitated work groups to accomplish: (1) a meeting atmosphere (smaller group size) that encouraged all participants to share their perspectives and points-of-view, and (2) to determine the degree of consistency between two independently facilitated groups. The results revealed significant congruity of ideas and recommendations across the two groups.

Results

Since the results of the two focus groups were very similar, they were combined to reduce repetition for a total of 79 comments. Comments were categorized into four major categories—benefits (14 comments); opportunities (19 comments); barriers (16 comments); and Recommendations (30 comments). The "Recommendations" category was further subdivided into new coalitions and partnerships (7 comments); education, technical assistance and information (12 comments); financing and cost reduction (5 comments); and marketing and promotion (5 comments). These 79 comments/results are presented in the Appendix A.

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1 National Alternative Enterprise and Agritourism Leader, NRCS, USDA; Professor, Department of Park, Recreation and Tourism Resources, Michigan State University, and Retired Natural Resources Conservation Service, respectively.

The 79 comments were studied to identify any common themes/words that appeared in at least one or more of the categories noted above. The common themes/words provided the link to better understand the perceptions of the participants. A total of 11 themes were found to be common to the agritourism, recreation, and alternative enterprises of *benefits, opportunities, barriers, and recommendations.* These themes or words are: sustainable, income, conservation, rural development, politics/public support, partnerships, education, technical assistance, financial assistance, cost reduction, and marketing and promotion. These results are shown in Table 1 and summarized below by category.

Benefits

Agritourism, recreation and alternative enterprises economically sustain the farm, ranch and local community. Income and travel from on farm tourism stimulates rural development while forging new relationships with the public about agriculture, natural resources and conservation. It is an excellent tool for educating the public about agriculture, stewardship, rural values and life styles. Authentic products and unique experiences are made available to the non-farm public. Tourism helps pay for conservation.

Opportunities

Agritourism, recreation and alternative enterprises are another part of a farm plan that can be used to conserve and protect the natural resource base through enterprise diversification. It provides farmers and ranchers the opportunity to improve and enhance the natural resources to more fully use these resources to increase income. Agritourism can be used to show the public the benefits of integrated resource management and forge coalitions with common concerns for food production and conservation. It is an excellent "value added" enterprise not only for the individual landowner but also for the community. Agritourism builds loyal repeat customers and "grass roots" support for agriculture and conservation. Agritourism builds rural development and increases job opportunities. Agritourism can be used to offset the cost of wildlife damages to agriculture turning it into a profitable agritourism (fee hunting) enterprise. Cooperative marketing provides the opportunity to assemble the critical mass needed to sell competitively or attract a large number of interested buyers. Agritourism provides the opportunity to market conservation as an "event."

Barriers

Agritourism, recreation and alternative enterprise development, by an individual or a community, are limited by the lack of information about (1) How to make an assessment of the opportunities? (2) How to manage? (3) How to finance? and (4) How to promote and market products? The perception of the lack of information on forming cooperatives and partnerships exists. Also, there is a perception of the lack of information on how to attract clientele, such as ethnic groups, facility design, marketing partnerships, tourism industry information, and agricultural tourism assessment. The biggest barriers are "How to do it?" and "Help me get started?"

There is a general lack of knowledge of where to get information or expert advice in developing rural agritourism, recreation and alternative enterprise. The laws and regulations need to be updated for small alternative enterprises. Lending institutions need to understand that agritourism is another farm enterprise and not a "risky" investment. Liability is a concern. There is a lack of field staff to assist in agritourism. This is some of the information and technical assistance needs of farmers and ranchers.

Recommendations

New coalitions with agriculture, tourism and conservation need to be formed. These partnerships and relationships need to be with the tourism marketing industry, tourism bureaus and agritourism interests. Agritourism needs to be part of the tourism industry marketing studies and promotion packages at the state, regional and national levels.

Information systems are needed for farmers/ranchers/communities interested in agritourism, recreation and alternative enterprises. They need to contain the latest information. Information is needed on; (1) How to make an agritourism, recreation or alternative enterprise assessment? (2) What are the management, business, and marketing principles of an agritourism, recreation and alternative enterprise business? and (3) How do you package and market products? Information needs to be developed cooperatively by agriculture, conservation, and the tourism sectors. Reference manuals need to identify coordinated assistance and use of existing programs for agritourism, recreation and alternative enterprises. Elected officials, media, tourism industry and others need to be informed about agritourism, recreation and alternative enterprise benefits for sustaining rural America and the natural resources. A financial information/lending package is needed for entrepreneurs to better work with their lenders. Also, it must contain data on liability insurance and sources.

An agritourism and recreation directory of assistance and resources is needed.

Summary and Conclusions

The comments about barriers and recommendations indicated there is a significant lack of knowledge about what information exists to help farmers and ranchers. A review of literature and discussions with leaders in the field indicate there is a wealth of information on agritourism, recreation and alternative enterprises. This information exists at the Federal, state and local level. The best information sources are entrepreneurs that operate agritourism, recreation and alternative enterprise businesses. Most of these people are willing to share their experiences.

The Natural Resources Conservation (NRCS) is responding to meeting the need of the farmers and ranchers. A resource manual containing names of experts and other information sources has been distributed to Resource Conservation and Development Councils and other organizations upon request. This manual is continually being updated and distributed. NRCS is also working with others in USDA in developing a "tool box" of information for agritourism, recreation and alternative enterprises. This "tool box" is currently under development and will consist of existing information, videos, books and publications to help answer the questions of:

- How to make an assessment of the opportunities?
- How to manage an agritourism and alternative enterprise?
- How to finance an agritourism and alternative enterprise?
- How to market and promote an agritourism and alternative enterprise?

For more information on the status of this "tool box," contact Jim Maetzold at 202-720-0132 or e-mail <jim.maetzold@usda.gov>

Table 1 Agriculture/Alternative Enterprise Opportunities, Benefits, Barriers and Recommendations: Results of an Agritourism and Natural Resources Forum, January 9, 1997

Common Theme/Word	Benefits	Opportunities	Barriers	Recommendations
Sustainable	-preserve family farm/ranches by adding new income source -rural communities -sustain agriculture	-loyal repeat customers via catalogue, visits that stabilize income, community -preserve rural communities -rural tourism development		-establish new agritourism coalitions -add agritourism to existing coalitions -show tourism and rural sustainability links -partnership with travel intermediaries and tourism marketing -develop themes and messages that promote agritourism
Income	-off season employment -market driven historic preservation and restoration -increasing farm income by tourism enterprise diversification	-on farm/ranch jobs -establish a continued demand for specialty products -value added products -for fee access to private lands		
Conservation	-tourism pays for conservation -environmental enhancement	-gain/shape public support and opinion for conservation -show benefits of conservation programs -show benefits and requirements of integrated resource management to public		

Rural Development	-community stability -complements other rural attractions -retains farms/ranches and related agricultural and tourism businesses	-generates community support and assistance -tourism as a jump start to rural development -preserve and present heritage	-rural communities lack experience on effective tourism development and marketing -lacks information as to where to get assistance -lack physical facilities where tourism has great potential -rural communities lack critical mass to attract tourists	-agritourism can add critical mass to rural community tourism -form community coalitions that promote community and agritourism
Politics/Public Support	-demonstrates conservation to secure support -enhance understanding of agriculture and conservation -develop future constituencies -enhance support to preserve farm and natural resource production capacity	-expand stakeholders that influence agriculture, tourism and conservation -"grass roots" support for natural resources legislation	-many out-of-date laws and regulations at federal, state and local levels -some tax legislation discourages tourism on farm and ranch enterprises -laws or local regulations have negative effect on agritourism	-partner with public organizations and media

Partnerships	-forge new understanding and relationship of public, agriculture, conservation, tourism industry, and agritourism	-compatible objectives of agriculture producers and conservation organizations -different coalitions involved in tourism with common concerns will work together to solve objectives -integrate agritourism, tourism industry and commercial recreation . -closer cooperation among agriculture, tourism,	-no link between agriculture and tourism industry information system -lack of partners in marketing and organizational development -farmers/ranchers must realize the benefits of a group working together as a group or community	-communication and joint ventures among agriculture, conservation and tourism industries -establish partnerships with travel intermediaries and tourism marketing organizations -operators partner with universities, agencies and industry associations on state conferences and workshops -include the infrastructure--hotels, restaurants, stakeholders etc. -cooperatively develop and test educational materials for agriculture and conservation tourists
Education	-conservation examples for visiting tourists to show regard for environmental issues. -enhance public understanding of agriculture and environment by demonstration -show stewardship of agriculture to public -convey rural values and life-styles	-incentive to add conservation to farm/ranch/community -create recognition of agriculture being capable stewards -natural resource use can be managed to be sustainable and environmentally sound -conservation education -tourist hands on desire, "adventure", "experience"		-develop information for the travel intermediaries and tourism marketing organizations on agriculture types, availability, timing, seasonality, type and capacity of facilities, etc. -develop information on agritourism for the agricultural organizations

Technical Assistance	-conservation -resource assessment and whole farm planning	-leadership experience for rural cooperative community tourism development	-lack of information on how to tie farm/ranch operations into a tourism without daily operations interruptions -deficiency of "how to" information -lack experience or knowledge on tourism marketing and distribution -lack sources of tourism information -lack of knowledge for package design, merchandising and selling value added products-gift ready-and services -minority farmers need information on "how to go about it" and reaching the ethic and other tourism markets -cooperative marketing benefits must be understood -lack of tourism type leadership in rural areas -how to do a tourist market evaluation -how to do a feasibility assessment -lack of tourism facility design information	-how to access and work effectively with travel intermediaries and tourism marketing associations -inform agriculture about the opportunities of tourism and how the business functions -inform elected officials, agriculture and economic development organizations about tourism revenues, barriers, etc. -how to do ranch/farm/ tourism feasibility evaluation of resources and markets -need practical information on tourism operation, management, marketing, laws, regulations, etc. -develop technical assistance manuals for operators -provide coordinated technical assistance across agencies, agriculture and conservation groups -fund comparable research to define potential tourism markets, access impacts -develop material to encourage use of conservation/resource programs-CRP, WHIP, WRP etc. in tourism enterprises.

Financial Assistance			-lending institutions view tourism enterprises as "risky" -lending institutions lack knowledge on agriculture tourism revenues and returns on investment and management	-develop and distribute financial information on tourism enterprises, and community economic impacts -identify sources of funding -work to find favorable interest loan rates
Cost Reduction		-excess wildlife is a cost to farmers and ranchers which can be offset by revenues from wildlife tourist experiences	-liability fears and costs	-work cooperatively to reduce the cost of insurance -increase flexibility of insurance programs -understand liability claims
Marketing and Promotion	-authentic products -unique experiences outdoor, heritage, rural attraction -combine with special local and state events -adaptive re-use of old buildings and heritage	-specialty products with value added attributes -tourism is a growth market--environment, heritage, culture, adventure and international -compatible objectives of agriculture and conservation organizations can create tourism on farms and ranches -cooperative marketing to obtain a critical mass to attract tourists -tourists attracted to "hand-on" learning. -ethic market demand increasing -market "conservation" as a tourism special event -growth market for nature-based, heritage, farm-based recreation	-lack of information on agriculture facilities, etc. needed by tourism industry -lack resource people in natural resource agencies and extension to help with marketing tourism and conservation -no national association that connects agriculture and the tourism industry.	-operators need to establish cooperative agreements with travel and tourism marketing organizations -develop relationships across agricultural industries and tourism marketing organizations -involve services groups--hotels, hospitality etc. - increase media coverage of agricultural tourism -states and communities need to include agriculture tourism as features in promotional packages -states and communities need to compile an inventory of agriculture tourism -national and state tourism market studies should cover agriculture tourism -more field and state staff training

Appendix A

Agriculture/Alternative Enterprise Opportunities, Benefits, Barriers and Recommendations: A Summary of the Flip Chart Notes at the Agritourism and Natural Resources Forum, January 9, 1997

Note: Agritourism will be used throughout the comments below to mean "agritourism, recreation and alternative enterprise income-producing opportunities on farms, ranches and in rural communities.

Potential Benefits of Agritourism

1. Agritourism has potential as a vehicle for preserving family farms, ranches, and natural resource products operations by providing additional non-governmental revenues (especially during periods of low and uneven cash flow) that can be the difference between profit and loss.

2. Agritourism has potential for new sources of revenues from products and services (e.g. paid hunting, educational opportunities) that can be incorporated as part of "working" farms, ranches, and natural resource products operations. Agritourism is dependent on authenticity and involvement, not theme park representations.

3. Agritourism can encourage and provide incentives (e.g. financing) for conservation on private lands, and at the same time provide increased access to privately own natural, cultural, and recreation resources. In part, this is because tourists/ visitors are more sensitive and concerned regarding environmental issues. Also, tourist/recreation revenues can help finance conservation investments.

4. Agritourism can provide important first time and supplemental employment opportunities for farm families, farmer's presently working "off farm" jobs, youth, and retirees. These employment opportunities can contribute to community stability and rural development.

5. Agritourism can provide unique outdoor recreation, recreational shopping, education, and heritage opportunities. These opportunities can complement and supplement other recreation and rural tourist attractions and help create "critical mass" necessary to attract tourists and increase their length of stay.

6. Agritourism can generate revenues and important cash flow during the off-seasons for both agritourism and tourism businesses. Additional off-season attractions and activities (e.g. mushroom picking, blossom tours, and cattle branding) can create "new and profitable seasons." Off-season revenues can help finance investment in new facilities, conservation practices, services and marketing that can enhance the quality and profitability of the overall operation.

7. Rural communities can benefit from retention of farms, ranches, processing plants, and natural resoruce product businesses; economic diversification and integration of local economies; and additional amenities (museums) and recreational opportunities.

8. Agritourism offers the potential for developing and expanding future constituencies for agriculture, ranching, and natural resource products production. This is particularly important because fewer people will make their living directly in these industries. Agritourism provides opportunities to form important relationships and enhance public understanding, which will be important to the future of agriculture and natural resource protection.

9. Agritourism can provide opportunity to demonstrate, and educate tourists about the benefits of land and natural resource conservation practices (e.g. wildlife habitat, erosion control). There are also opportunities to show benefits of cooperative stewardship.

10. Agritourism provides various ("up close and personal") opportunities to educate different publics about past and current farming, ranching, natural resource product production methods, integrated conservation practices, as well as the importance and contribution that these industries make to their quality of lives. This can help forge new understanding and relationships between urban residents, rural businesses, and resource conservation organizations.

11. Agritourism can strengthen public support for agriculture, ranching and natural production through greater visibility, enhanced understanding, and mutual beneficial ventures (e.g. winery-hotel packages, restaurant events featuring locally raised products).

12. Agritourism provides opportunities to educate visitors about many important values produced as a result of agriculture, ranching, and natural resource products production (e.g. rural landscapes, open space, rural life-styles, retention of wildlife and fish habitat) as well as problems confronting these businesses. This awareness can enhance local/community support and efforts to preserve farm and natural resource production capability.

13. Agritourism can demonstrate the many benefits of public-private special events. For example, Oregon's Tree Day attracted approximately 2000 visitors in 1996 and introduced many urban residents to the realities of rural America.

14. Agritourism can also encourage adaptive re-use of old buildings and structure. Examples of "adaptive reuse" are using an old barn as a craft store, turning a fire tower into a Bed and Breakfast, and green house as a restaurant. Agritourism can support market driven historic preservation and restoration.

Opportunities for Agritourism

1. Tourist are often looking for, and willing to pay for specialty products and packages (e.g. decorator baskets filled with fruit, jellies in cut glass jars) that can substantially increase the profitability of farm and natural resource products compared to wholesale or bulk sales.

2. Direct marketing of specialty agricultural and natural resource products can generate a continuing "demand" and opportunities for catalogue and mail order distribution, and sales though specialty retail, and gourmet shops.

3. Agritourism will provide additional income, incentives and support for preservation and presentation of agriculture and natural resource products heritage; natural resource conservation enhancement; preservation of rural communities and life styles.

4. Many of the tourism growth market-environmentally sensitive tourists, heritage tourists, soft-adventure tourist, international visitors, -are also markets for various type of agritourism.

5. Agritourism offers potential for educating visitors about the benefits and requirements of integrated resource management and conservation in contrast to mandated protection. There swill be opportunities to educate tourist that natural resources can be utilized and managed in a sustainable and environmentally sound fashion.

6. Private agricultural, grazing, and forestry lands have many attractions that would be of interest to tourist. Agritourism has the potential for increasing a "for-a-fee" access to these attractions.

7. Agritourism also provides opportunities to create recognition of the fact that private landowners, farmers, ranchers, and foresters, have been, and still are capable stewards of natural and cultural resources.

8. Agritourism can bring about recognition on that there is significant synergy and compatibility of the objectives of different agricultural, natural resource producers, and natural resource conservation organizations (e.g. farmland trust, pheasants forever, watershed councils). Also, that these objectives can create opportunities for tourism businesses, farmers, and ranchers.

9. Merging education and marketing efforts of agriculture, natural resource product producers, and conservation interest could greatly expand the stakeholders and the political influence of agricultural, tourism, and conservation interests.

10. Agritourism and the different coalitions that will be required have the potential for identifying common concerns, issues, needs, and objectives among farmers, ranchers, natural resource produces, tourism businesses, historical trusts, and local communities.

11. Many areas lack the necessary critical mass of tourism attractions, leadership infrastructure, and experience with cooperative marketing needed to encourage and support the development of tourism. Agritourism is one way to initiate or jump-start the development process. It can activate the process of developing the community support, networks, and leadership infrastructure needed for sustainable rural tourism development.

12. There are increasing numbers of tourists attracted to "hands-on" learning experiences. They are enthusiastic about experiencing and learning how to make wine, grow wildflowers, weave wool into yarn, raise buffalo, brand cattle, and contribute to conservation efforts. These "educational" and "change of life" (i.e. persons in search of second careers, retirement hobbies and even volunteer opportunities) tourists are a real growing market of agritourism.

13. There is a growing ethnic market, many of which has "rural-agricultural-natural resource roots," or are interested in specialty foods and natural resource products. Specialty products and experiences can be developed for these markets. For example: farm vacation offered by Afro-American farmers.

14. There is potential for continuing and broadening relationships with agritourism tourists such as adopt an animal, a fruit tree, or an entire farm, and extended "farm/ranch stay" vacations.

15. In some areas of the country wildlife are viewed as a cost not an asset to farmers and natural resource product producers. The ability to generate revenues through sale of different experiences (e.g. paid hunting, wildlife photography) may change this perception and generate additional investments in wildlife management.

16. There are opportunities to market special conservation issues and events as part of agritourism marketing (e.g. Arbor Day).

17. There are opportunities to form the equivalent of agritourism cooperatives in which operator's work together to supply, manage, package, and market recreational and tourism opportunities. This could include wildlife/hunting cooperatives and farm tours. The cooperatives would join resources to do cooperative packaging and marketing, reservation/bookings, and product improvement (e.g. wildlife management, educational materials, and programming).

18. There are opportunities to create "grass roots" support for incorporating agritourism development as part of agricultural and natural resource legislation (e.g. Wildlife Habitat Incentive Program, Wetland Conservation Program).

19. Greater recognition of the potential economic development benefits associated with preservation of agriculture and natural resource products; heritage (e.g. forestry, commercial fishing, and mining) can encourage increased support for efforts to preserve and present this heritage.

Existing and Potential Barriers to Agritourism

1. Travel agents, tour planners, and bus companies generally lack adequate information (e.g. facilities, services, capacity, availability) about the agritourism opportunities and how to access/book them. This information is needed to design tours, arrange visits, and make bookings.

2. Farmers, rancher, and natural resource producers are not informed or experienced in tourism marketing and distribution systems. Many are not aware of different sources of tourism information and technical assistance. This lack of awareness is especially important during start-up stages of agritourism businesses.

3. Many rural communities lack experience, resources (money, time) and contacts needed for effective tourism development and marketing (e.g. creating awareness, inducing trail visits, media coverage). Small operators often do not perceive that they have enough money or time (in addition to managing their primary operation) to devote to marketing, partnership development, and organizational development.

4. Farmers, ranchers, and natural resource producers are often unfamiliar with merchandising (e.g. point of purchase displays, labeling, design of merchandising space) and travel packaging methods (e.g. tours) important in "selling" value-added products and services.

5. There has been an inadequate effort to inform farmers, especially minority farmers, about the potential of agritourism, or "How to go about it?"

6. Start-up packaging and cooperative marketing of agritourism will require leadership capable of generating, organizing and focusing resources toward common objectives. This leadership is often deficient in rural areas that have the greatest potential for agritourism. Frequently, small operators view themselves more as competitors than as partners working cooperatively to increase market share and mutual successes.

7. Tourism is an industry comprised of many small businesses and different organizations (e.g. visitor and convention bureaus, room tax districts, chambers of commerce). It is often perplexing, and takes time for new agritourism entrants to understand "What is necessary?" to access and partner with different elements of the tourism system.

8. Persons interested in starting agritourism businesses often lack expertise and access to technical assistance relating to tourism market evaluation, feasibility assessment, design of tourism/recreation facilities and service, packaging, merchandising, and start-up marketing.

9. There are relatively few persons in agriculture and natural resource agencies, cooperative extension, universities, or consulting companies with experience in agritourism. There is currently no national association that focuses attention on agritourism.

10. We lack case studies and demonstration projects that evaluate and document (processes, steps, obstacles, mistakes, innovation) agritourism development efforts. There is a deficiency of "How To?" information available to potential operators and organizations that provide technical assistance to farmers, ranchers, or natural resource producers.

11. Downsizing of federal and state government, cooperative extension, and universities may further reduce access to information and technical assistance.

12. Operators are some time reluctant to open their properties for visitation by the public because they fear liability and potential visitor interference with their main operation. In some instances, this is because they lack information on risk management and recreation liability insurance, visitor management, and how other operators have successfully integrated tourism into farming, ranching, and natural resource products operations.

13. Some rural communities with significant agritourism potential lack facilities and services (e.g. lodging, quality restaurants, shopping opportunities, signage, travel information) to adequately accommodate tourists.

14. Organizations (private and public) that provide and arrange financing for farms, ranches, and small businesses are frequently unfamiliar with potential (revenues, return-on-investment, payback) of agritourism. Lenders often view the combination of agriculture and tourism as "too risky."

15. There are many "out-of-date" regulations and laws at the federal, state, and local levels that unnecessarily increase start-up cost and reduce profits of agritourism businesses.

16. Some tax regulations (e.g. property, estate) effectively discourage and complicate investment in agritourism.

Recommendations

New Coalitions and Partnerships

1. Sustainable and profitable agritourism will require new and continuing coalitions and partnerships focused on measurable bottom-line accomplishments (e.g. increased market size and diversification, profits, and financial and political support for agriculture and natural resource production and conservation).

2. There is a need for more communication and joint ventures between agriculture, natural resource product producers, tourism industries, agritourism commodity organizations, and natural resource conservation organizations to develop and capitalize on the potential of agritourism.

3. It is critical to identify travel intermediaries (e.g. tour packagers, travel writers) and tourism marketing associations that can/should be involved in agritourism. Agritourism operators need to be educated on how to access and deal effectively and efficiently with these organizations.

4. Agritourism operators and other support organizations need to cooperate with travel intermediaries (e.g. bus tour planners, tour packagers) and tourism marketing organizations to develop the types of information they require to promote and arrange visits to agritourism operations. This information must be designed and formatted to meet customer needs.

5. Agritourism operators should partner with universities, agencies, and industry associations to organize national and state conferences and workshops to increase awareness of agritourism, and to develop relationships across industries and marketing organizations.

6. It is important that different stakeholders (e.g. hotels, agricultural organizations, local hospitality industry, and economic development organization) are aware of, and involved in the process of developing and marketing agritourism.

7. Agritourism leaders, industry organizations, natural resource conservation organizations, and agencies should work cooperatively to develop an action plan for encouraging and supporting agritourism including: specific tasks (e.g. individuals and organizations that should be involved) and a timetable for getting things done.

Education, Technical Assistance and Information

1. Agriculture and natural resource producers need to be educated about tourism, especially how the tourism industry is organized, managed, and marketed. This includes the various industry organizations (e.g. state tourism agencies, visitor and convention bureaus, bus association, travel agents), promotional alternatives (e.g. directories), and sources of technical assistance.

2. Elected officials, agriculture and natural resource agencies, and economic development organizations must be advised about the immediate and long-term benefits of agritourism, barriers to start-up and profitable operation of agritourism businesses, and what it will take to eliminate barriers and enhance opportunities for success.

3. Rural communities and economic development organizations must be better informed about the potential of agritourism for contributing to integrated sustainable economic development—retention, start-up and expansion of complementary businesses. This should include case studies of successful development and marketing of agritourism.

4. Travel intermediaries and tourism marketing organization (e.g. promotional organizations, tour planners, travel agents) need better information about agritourism opportunities to understand and identify potential target markets and opportunities for packaging and marketing partnerships. They need better information on types and availability of agritourism experiences and products (fruits, vegetables, maple syrup), as well as the timing of different farming, ranching and natural resource products practices and activities (e.g. blossoms, harvest, branding), and type and capacity of facilities and service (e.g. tours, restaurants). This information will help them develop, target and time their marketing activities.

5. There is an immediate need for practical information to help evaluate the feasibility of agritourism businesses as stand alone businesses, and sources of supplementary income to farms, ranches, natural resource producers, and processors.

6. Potential agritourism operators need access to practical information on how to start and operate tourism/recreation businesses. This information includes: market assessment methods, facility and service requirements, required investment, start-up marketing, laws and regulations, financial management, risk management, sources of information, and tourism organizations.

7. Develop and make accessible frameworks to help farmers, ranchers, and natural resource product producers, systematically assess the potential of starting agritourism operations.

8. Improve access to information and technical assistance to existing and potential operators to help them define/assess the needs/wants of different tourist/recreation market segments.

9. Develop and make accessible tools (e.g. checklist, structure questions), resource lists, and referral service (i.e. organizations that provide business expertise) to enhance the operation of agritourism operations.

10. Develop technical assistance manuals which are available through different media (CD ROM, Internet, publications etc)

11. Identify and develop the capability to provide quality coordinated technical assistance to agritourism operations involving partnerships between agriculture and natural resource agencies, cooperative extension, universities, economic development agencies, commodity groups, and business support organizations.

12. Fund, conduct and make accessible comparable research in different states sponsored by Agriculture Experiment Stations, Department(s) of Agriculture, Cooperative Extension, and tourism agencies to better define existing and potential agritourism markets, and assess the impact (e.g. economic, political educational) of agritourism.

13. Different organizations should cooperate to develop and test educational material (e.g. signage, displays, and take-away materials) and interpretive materials designed to educate agritourism tourists about farming, ranching, natural resource products, and natural conservation resources.

Financing and Cost Reduction

1. Generate and distribute information to enhance understanding of financial aspects (start-up and operating costs) of different types of agritourism operations, and the potential economic impacts (e.g. tourist spending, off-season revenues) associated with various types and scales of agritourism.

2. Work cooperatively with elected officials, insurance providers, and operators to reduce the high cost of insurance, and develop more flexible and adaptable coverage.

3. Identify alternative sources of funding that are available and can be combined to finance the start-up and marketing of agritourism.

4. Allow and encourage operators to combine different cost share programs (CRP, WRP, and WHIP) in ways that will support agritourism especially as it relates to the application and demonstration of conservation practices.

5. Work with elected officials and members of the financial community to encourage favorable interest rate loans as an incentive for agritourism start-ups.

Marketing and Promotion

1. A cooperative effort by different industries and organizations to increase media awareness and coverage of agritourism.

2. Agriculture and tourism industries and their marketing organizations should work cooperatively to develop themes and messages that benefit tourism and agriculture.

3. States and communities should compile inventories of agritourism attractions, education materials and programs, festivals, and special events, as well as complementary attractions that can be promoted and packaged in cooperation with tourism businesses and tourist marketing organizations.

4. Incorporate agritourism in national and state tourism market studies and inquiry tracking systems in an effort to better define existing and potential markets and assess interest in various types of agritourism.

5. State and local tourism promotion campaigns should incorporate and feature agritourism opportunities, and tourism marketing and tour organizations should incorporate agritourism attractions as part of their tours, familiarization trips, and travels packages.